

CLAIMS

What is claimed is:

1. A method for establishing a mapping between internal metadata and external metadata in a report design environment, the method comprising:

organizing internal metadata in a grid having rows and columns, wherein dimensional metadata from said internal metadata is placed in the grid as row headings and/or column headings;

receiving from a user a selection of a portion of said grid, said selection indicating internal metadata to be mapped;

receiving from said user a definition of external metadata describing all data points within said selection; and

creating a mapping between said selected internal metadata and said defined external metadata.

2. The method of claim 1, further comprising:

retrieving the internal metadata from a database.

3. The method of claim 1, further comprising:

determining if the external metadata describing all data points within said selection is predefined; and

wherein if the external metadata describing all data points within said selection is predefined, said receiving from said user a definition of external metadata comprises:

presenting said user a list from which they may select an item of predefined metadata; and

receiving from said user a selection of an item of predefined metadata from said list.

4. The method of claim 3, wherein said list is provided in a tree control.

5. The method of claim 3, further comprising:

determining if syntax of the external metadata describing all data points within said selection is predefined; and

wherein if the external metadata describing all data points within said selection is not predefined, but syntax of the external metadata describing all data points within said selection is predefined, said receiving from said user a definition of external metadata comprises:

presenting said user with one or more dialog boxes in which they can specify external metadata to be created; and

receiving from said user a specification of external metadata to be created.

6. The method of claim 5, wherein said presenting includes presenting said user with a dialog box in which they can specify an entity for said external metadata to be created.

7. The method of claim 5, wherein said presenting includes presenting said user with a dialog box in which they can specify units for said external metadata to be created.

8. The method of claim 5, wherein said presenting includes presenting said user with a dialog box in which they can specify a time period for said external metadata to be created.
9. The method of claim 5, wherein said presenting includes presenting said user with a dialog box in which they can specify a scenario for said external metadata to be created.
10. The method of claim 9, wherein a control for said dialog box is a tree control when an element button is selected and a text field when a custom button is selected.
11. The method of claim 1, wherein said selection is one or more rows in said grid.
12. The method of claim 1, wherein said selection is one or more columns in said grid.
13. The method of claim 1, wherein said selection is one or more individual cells in said grid.
14. The method of claim 13, wherein preexisting mappings for rows or columns containing said selection are overwritten for said selected individual cells.
15. The method of claim 1, further comprising:
 - receiving from said user a formula involving one or more data items in said grid;
 - creating a new row or column in said grid;
 - entering said formula into a cell in said new row or column; and
 - wherein said selection includes said cell.

16. The method of claim 1, wherein said external metadata is Extensible Business Reporting Language (XBRL) metadata.

17. The method of claim 1, wherein an external metadata source is specified using a schema manager.

18. An apparatus for establishing a mapping between internal metadata and external metadata in a report design environment, the apparatus comprising:

- an internal metadata grid organizer;
- a grid portion user selection receiver coupled to said internal metadata grid organizer;
- an external metadata user definition receiver coupled to said grid portion user selection receiver; and
- an internal metadata-to-defined external metadata mapping creator coupled to said external metadata user definition receiver.

19. The apparatus of claim 18, further comprising:

- an internal metadata database retriever coupled to said internal metadata grid organizer.

20. The apparatus of claim 18, further comprising:

- a predefined external metadata selection determiner coupled to said external metadata user definition receiver; and

wherein said external metadata user definition receiver includes:

- a predefined metadata list presenter; and

a predefined metadata list item receiver coupled to said predefined metadata list presenter.

21. The apparatus of claim 20, further comprising:

a predefined external metadata syntax determiner coupled to said external metadata user definition receiver; and

wherein said external metadata user definition receiver includes:

an external metadata dialog box presenter; and

an external metadata specification receiver coupled to said external metadata dialog box presenter.

22. The apparatus of claim 18, further comprising:

a user formula receiver;

a new row or column creator coupled to said user formula receiver and to said internal metadata grid organizer;

a new row or column user formula placer coupled to said new row or column creator and to said user formula receiver.

23. An apparatus for establishing a mapping between internal metadata and external metadata in a report design environment, the apparatus comprising:

means for organizing internal metadata in a grid having rows and columns, wherein dimensional metadata from said internal metadata is placed in the grid as row headings and/or column headings;

means for receiving from a user a selection of a portion of said grid, said selection indicating internal metadata to be mapped;

means for receiving from said user a definition of external metadata describing all data points within said selection; and

means for creating a mapping between said selected internal metadata and said defined external metadata.

24. The apparatus of claim 23, further comprising:

means for retrieving the internal metadata from a database.

25. The apparatus of claim 23, further comprising:

means for determining if the external metadata describing all data points within said selection is predefined; and

wherein if the external metadata describing all data points within said selection is predefined, said means for receiving from said user a definition of external metadata comprises:

means for presenting said user a list from which they may select an item of predefined metadata; and

means for receiving from said user a selection of an item of predefined metadata from said list.

26. The apparatus of claim 25, wherein said list is provided in a tree control.

27. The apparatus of claim 25, further comprising:

means for determining if syntax of the external metadata describing all data points within said selection is predefined; and

wherein if the external metadata describing all data points within said selection is not predefined, but syntax of the external metadata describing all data points within said selection is predefined, said means for receiving from said user a definition of external metadata comprises:

means for presenting said user with one or more dialog boxes in which they can specify external metadata to be created; and

means for receiving from said user a specification of external metadata to be created.

28. The apparatus of claim 27, wherein said means for presenting includes means for presenting said user with a dialog box in which they can specify an entity for said external metadata to be created.

29. The apparatus of claim 27, wherein said means for presenting includes means for presenting said user with a dialog box in which they can specify units for said external metadata to be created.

30. The apparatus of claim 27, wherein said means for presenting includes means for presenting said user with a dialog box in which they can specify a time period for said external metadata to be created.

31. The apparatus of claim 27, wherein said means for presenting includes means for presenting said user with a dialog box in which they can specify a scenario for said external metadata to be created.
32. The apparatus of claim 31, wherein a control for said dialog box is a tree control when an element button is selected and a text field when a custom button is selected.
33. The apparatus of claim 23, wherein said selection is one or more rows in said grid.
34. The apparatus of claim 23, wherein said selection is one or more columns in said grid.
35. The apparatus of claim 23, wherein said selection is one or more individual cells in said grid.
36. The apparatus of claim 35, wherein preexisting mappings for rows or columns containing said selection are overwritten for said selected individual cells.
37. The apparatus of claim 23, further comprising:
means for receiving from said user a formula involving one or more data items in said grid;
means for creating a new row or column in said grid;
means for entering said formula into a cell in said new row or column; and
wherein said selection includes said cell.

38. The apparatus of claim 23, wherein said external metadata is Extensible Business Reporting Language (XBRL) metadata.

39. The apparatus of claim 23, wherein an external metadata source is specified using a schema manager.